CONSUMER RESPONSE UPDATE

March 2003: Issue N°13

Ontario
Ontario Tourism Marketing Partnership Corporation
Partenariat ontarien de marketing touristique

HIGHLIGHTS

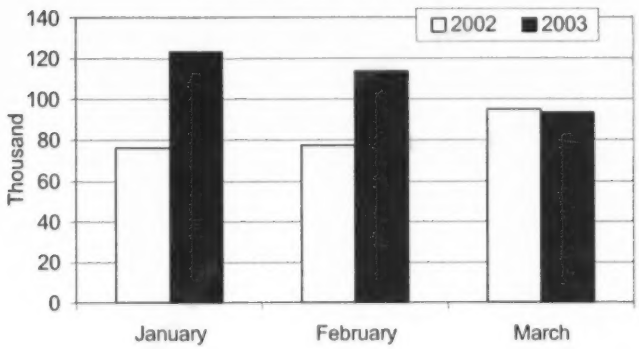
- ***OTMPC's Spring Campaign is off to a great start! In just 2½ weeks of its launch, nearly 3,200 consumers registered with the Spring MicroSite!***
- ***OTMPC's Consumer Launch Campaign, closed March 19, prompted 3,800 consumer registrations to OntarioTravel.net in just one month!***
- ***User sessions at OntarioTravel.net grew 33% in the first quarter of 2003 over the first quarter of 2002!***
- ***Call volume decreased proportionately (31%) in the first quarter of 2003 over the first quarter of 2002.***

WEB SITES

B2C SITE – www.OntarioTravel.net

- As shown in the chart below, user sessions in March declined slightly (-2%) over March 2002.
- Year-over-year growth in January and February, however, was substantial enough to boost user sessions in the first quarter of 2003 33% over the first quarter of 2002.

User Sessions Grow at OntarioTravel.net: QI 2003 vs. QI 2002



- The decline in user sessions in March (the first since August 2002) seems, in part, attributable to the Iraq War and SARS.
- On March 20, user sessions dropped 44% over March 19, the evening of which saw the onset of the War in Iraq. User sessions in the midst of War and SARS (from March 20 to March 31) were 31% lower than during the first half of the month, and 4% lower than during the same period last year.
- March's decline also seems, in part, due to the timing of the Spring Campaign relative to last year.
- Last year saw – with the Web among calls-to-action – Spring Postcards drop in late February (over a month sooner than this year) and TV ads in mid-March.
- March 10, 2003 saw the highest level of user sessions at OntarioTravel.net *and* the highest volume of calls offered to Call Centre agents for the month of March. The high volume (its origin not likely the result of advertising) was probably produced by March Break planners.

ONLINE PUBLICATIONS

- In March 2003, 24 online publications were downloaded 9,500 times.
- OTMPC's 2003 Adventure Guide was downloaded most often (1,750 times).

REGISTERED CONSUMERS

- Between the Web site's launch on October 18, 2002 and March 26, 2003, nearly 22,500 consumers registered with OntarioTravel.net!
- Of registered consumers, 13,950 (62%) opted to receive e-marketing material from OTMPC.
- The majority (97%) of registered consumers to date are English-speaking, Canadian (61%), and male (56%).

B2B SITE – www.TourismPartners.com

- In March, user sessions at TourismPartners.com dropped slightly (-6%) over March 2002. Site registration not being heavily marketed during the month may have sparked the drop by not pushing user sessions past the level achieved last March.
- Because of significant year-over-year growth in January and February, however, user sessions at the site grew 11% in the first quarter of 2003 over the first quarter of 2002. This is shown in the following chart.

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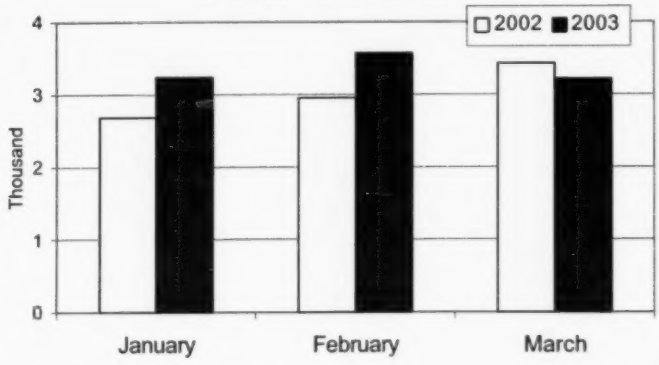
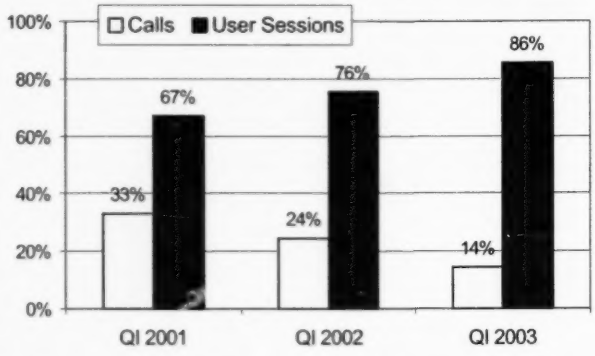
User Sessions Grow at TourismPartners.com: QI 2003 vs. QI 2002



Calls, User Sessions as a Proportion of Consumer Response: QI 2003 vs. QI 2001



REGISTERED PARTNERS

- Between the Web site's launch on October 18, 2002 and March 31, 2003, almost 2,500 partners registered with TourismPartners.com.

CALL CENTRE

- Total calls offered to the Call Centre in March 2003 totalled just over 20,200; a drop of 39% over March 2002.
- Overall, call volume dropped 31% in the first quarter of 2003 over the first quarter of 2002.
- Over the past five years, calls to the Call Centre have changed in terms of volume, but not in the patterns they follow.
- In the first quarter of 2003, call volume decreased in February over January and increased in March over February, as in each year before it.
- It seems that travel planning behaviour and interest in travel, at least during the first quarter, have remained relatively constant over time, peaking and dipping in similar months, while the method of doing so has changed – from the phone to the Web.
- As a percentage of consumer response, phone calls have decreased steadily between the first quarter of 2001 and the first quarter of 2003. User sessions in the first quarter have increased steadily as a percentage of consumer response between 2001 and 2003.
- This trend - a change in consumer preference from the phone to the Web - is shown in the following chart.
- Of calls to the Call Centre in the first quarter of 2003, 81% originated in Canada and the remainder (19%) in the U.S.
- Of calls from Canada, the majority (83%) came from Ontario. In the U.S., the majority (59%) came from Ontario's 7 border states.

FULFILLMENT CENTRE

- Nearly 23,600 fulfillment pieces were requested by consumers in March, bringing fulfillment distribution for the first quarter of 2003 to 62,000.
- Fulfillment pieces in the first quarter of 2003 were distributed to consumers in Canada (67%), the U.S. (27%), and overseas (6%).
- Of fulfillment pieces distributed in the first quarter of 2003, 29% resulted from online orders.
- While it is unknown how the first quarter's total fulfillment distribution compares to that in the first quarter of 2002 (due to a change in tracking methods in May 2002), kit distribution in the first quarter of 2003 totalled 7,700 - down from 15,300 in the first quarter of 2002.
- It is likely that the availability of publications online in the first quarter of 2003 (combined with consumers' increasing Web use year-over-year) fuelled the drop in kit distribution. Publications were not online in the first quarter of 2002.
- At the Fulfillment Centre, as indicated in the following table, consumer requests for Spring and

Summer fulfillment pieces were prevalent among the top ten pieces ordered in the first quarter.

Top Ten Fulfillment Requests: QI 2003

	Fulfillment Piece / Kit	Quantity Distributed
1	Ontario Road Map	9,627
2	2002 Ontario Reference Guide	7,984
3	2002 Summer Experience Guide	5,478
4	2003 Adventure Guide	4,567
5	2002 Ontario Parks Guide	4,283
6	Summer Getaway Kit	2,086
7	Spring Kit	1,761
8	2003 Winter Getaway Guide	1,476
9	2002 Summer Events Guide	1,470
10	2003 Fish Ontario Guide	1,440

2003 SPRING CAMPAIGN

- OTMPC's Spring Campaign launched in March with the objective of motivating - through a Spring MicroSite and contest, a themed event at Union Station, direct mail postcards, newspaper ads, and fulfillment pieces - 'getaway' trips by Ontario residents within the province.

- To drive traffic to and encourage registration with OTMPC's consumer Web site, the Spring MicroSite and contest launched March 25. A registration with the MicroSite entered consumers into a contest to win a weekend getaway for two (valued at over $1,500) to the Canadian Tulip Festival in Ottawa.

- Half-page newspaper ads in the Toronto Sun throughout April and in the Toronto Star (April 3 and 5) promoted the contest, as did 500,000 postcards mailed unaddressed to homes in Burlington, London, Mississauga, Ottawa, and Toronto on March 31.

- OTMPC's themed event at Union Station on March 25 allowed the distribution each of 25,000 tulips, Spring Events and Spring Experience Guides to passers-by.

- Likely in relation to the event, March 25 saw Call Centre agents receive their highest volume of calls for a Tuesday in March.

- In response to the Spring contest, registrations on the Spring MicroSite to April 11 totalled nearly 3,200.

- April 2 and 3 were the busiest days to date on the MicroSite, generating 38% of all registrations between them. It is likely that consumers began receiving their Spring Postcards on these days, and the newspaper ads on April 3 were a boost to the already-high response.

- According to consumers, the majority (77%) of registrations were motivated by the Spring Postcard.

- Women entered the Spring contest most (65%), as did those aged 46 to 60 (30%).

- Virtually all registrations (99.7%) were made by Canadians. The remaining ten entries were made by Americans.

- The majority of Spring contest entries (89%) represented new registrations with OntarioTravel.net.

2003 CONSUMER LAUNCH CAMPAIGN

- Between February 19 and March 19, 2003, OTMPC invited consumers, via online ads and e-mails sent within Ontario, Michigan, New York, Ohio, and Pennsylvania, to "escape to Ontario".

- E-mail invitations and online ads detailed a contest, which if registered with, offered the chance to win one of three Ontario weekend getaways for two to Ottawa, London, or Lake Simcoe. The campaign's objective was to boost consumer registrations with OntarioTravel.net.

- Online ads (8.7 million page views) were present throughout the duration of the campaign. E-mail invitations (51,000) were issued during the second week of the campaign.

- By its close on March 19, just over 3,800 consumers registered with the contest.

- Online ads and e-mail invitations generated 56% and 24% of contest registrations, respectively.

- The majority of registrations (76%) were made by Canadians. More women (67%) than men (33%) registered, and registrations from those aged 25 to 35 (35%) were most prevalent.

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